

IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF MONTANA
MISSOULA DIVISION

TODD F. STEVENSON, an individual
on behalf of himself, and as grantor of
the Todd Stevenson 2013 Irrevocable
Family Trust and the Todd F.
Stevenson Irrevocable Life Insurance
Trust; TERRI L. STEVENSON, an
individual on behalf of herself, and as
grantor of the Terri L. Stevenson 2016
Irrevocable Family Trust; TODD J.
STEVENSON, an individual; and
JOSEPH D. STEVENSON, an
individual on behalf of himself, and as
grantor of the Joseph D. Stevenson
Irrevocable Life Insurance Trust;

Plaintiffs,

vs.

MASSACHUSETTS MUTUAL LIFE
INSURANCE COMPANY; THE
PENN MUTUAL LIFE INSURANCE
COMPANY; THE PENN
INSURANCE AND ANNUITY
COMPANY; SUMMIT FINANCIAL
GROUP; GP CAPITAL PARTNERS
LLC; THE BURGESS GROUP, INC.;
JOSHUA Q. GARDNER, an
individual; LAKE FOREST BANK &
TRUST CO., N.A.; SUCCESSION
CAPITAL ALLIANCE; and JOHN
DOES 1–5,

Defendants.

CV 24–109–M–DLC

ORDER

Defendant Wintrust Life Finance has withdrawn its pending motion to dismiss (Doc. 83). (Doc. 108.)

Accordingly, IT IS ORDERED that the motion (Doc. 83) is DENIED as MOOT.

DATED this 20th day of February, 2025.



Dana L. Christensen, District Judge
United States District Court